

HIGHER EDUCATIONAL AIDS BOARD

BOARD REPORT #03-17

2003-04 WISCONSIN HIGHER EDUCATION GRANT AND WISCONSIN TUITION GRANT
PROGRAM FORMULAS

WISCONSIN HIGHER EDUCATION GRANT

Introduction

I have included below the 2002-03 WHEG formulas for both the University of Wisconsin System and the Wisconsin Technical College System to be used as a reference. The general structure of the WHEG formula is outlined in the State Statutes. The components within may be adjusted to incorporate changes in the cost of education, the Federal Methodology that determines the Expected Family Contribution, the number of applicants which relate to the number of students who enroll, and the available funding.

If the Student Budget is increased, the amount awarded to each student would increase and the number of students eligible would decrease. The number of recipients would also increase if additional funding would be available to support the increase in eligibility.

If the Student Award Percentage is increased, the amount awarded each student would increase and the number of students eligible would decrease. The number of recipients would also increase if additional funding would be available to support the increase in eligibility.

2002-03

WISCONSIN HIGHER EDUCATION GRANT
UNIVERSITY OF WISCONSIN SYSTEM

The following formula was implemented in 2002-03 for both dependent and independent students.

Student Budget	\$3,568
Minus	Expected Family Contribution
X Student Award Percentage	47%
=	Award

MAXIMUM AWARD IS \$1,677

2002-03

WISCONSIN HIGHER EDUCATION GRANT
WISCONSIN TECHNICAL COLLEGE SYSTEM

The following formula was implemented in 2002-03 for both dependent and independent students.

Student Budget	\$7,000
Minus	Expected Family Contribution
X Student Award Percentage	15%
=	Award

MAXIMUM AWARD IS \$1,050

Formula Elements Known at This Time

Applicants: The number of 2003-04 UW System applicants is projected to increase. Enrollment within the WTC System schools may continue to increase dramatically.

Federal Methodology (which determines the Expected Family Contributions): There will not be any substantial changes in the formulas for 2003-04.

Appropriation: The 2003-04 appropriation for the UW WHEG Program per statutory language is tied to the previous year's UW tuition increase. Administration is currently interpreting the tuition increase to be used for this purpose as 8%.

The 2003-04 WTC WHEG Program appropriation is unknown at this time. Since 2003-04 is the first year of the biennial period, a final appropriation amount may not be known until some time after July 1, 2003. The governor will introduce his budget on February 18th. It will then go to the legislature for review and potential changes. Therefore, one of several scenarios may occur for 2003-04.

First Scenario:

Funding would increase per current statutory language based on last year's tuition increase.

UW WHEG \$23,586,800 (8% increase over 2002-03)

Funding would remain level funded.

WTC WHEG \$14,874,000 (0% increase over 2002-03)

Second Scenario:

Funding would increase per current statutory language per last year's tuition increase.

UW WHEG \$23,586,800 (8% increase over 2002-03)

Funding would increase per last year's UW tuition increase.

WTC WHEG \$16,063,900 (8% increase over 2002-03)

Third Scenario:

Funding would increase based on additional substantial tuition increases for 2003-04.

Fourth Scenario:

Funding would increase based on maintaining the same level of funding as the past.

UW WHEG Additional \$936,900 (4.29% increase over 2002-03)

WTC WHEG Additional \$638,100 (4.29% increase over 2002-03)

Fifth Scenario:

Funding would increase based on meeting increasing need due to the increase of needy applicants.

UW WHEG Additional \$873,600 (4% increase over 2002-03)

WTC WHEG Additional \$2,974,800 (20% increase over 2002-03)

Given the financial constraints the State of Wisconsin currently has, there of course could be other scenarios where funding would drop below the level appropriated in 2002-03. It is unknown at this time if this will occur.

Tuition Increase: The UW System tuition is estimated to increase 10% or more in 2003-04. The WTC System Board 2003-04 tuition percentage increase is unknown at this time.

Points to Consider in Setting the WHEG Formula

Most recent data indicates that the UW System WHEG will come close to spending the appropriated amount for the academic year. It currently appears that the WTC System Board WHEG 2002-03 formulas will overspend the appropriated amount for the academic year due to a dramatic increase in enrollment to the point where students were wait listed.

The 2003-04 WHEG Formulas

With the preceding information in mind, I put forth the following.

UW WHEG

1. If the funding for the 2003-04 UW WHEG Program is increased by the percentage of last year's tuition increase, the formula could be adjusted to spend 8% more for 2003-04.
2. If the funding for the 2003-04 UW WHEG Program increases or decreases, the formula should be adjusted proportionately.

NOTE: With an increase of 8% or more in funding a request to eliminate the grant maximum in the statutory language may be necessary.

WTC WHEG

1. If the funding for the 2003-04 WTC WHEG Program increases or decreases, the formula should be adjusted proportionately as well adjusted to compensate for the pool of applicants who were wait listed in 2002-03.

The UW System Administration and the WTC System Board will each forward their recommendations for the 2003-04 WHEG Formulas prior to the February 28th meeting. I will then make recommendations for the 2003-04 WHEG Formulas at the February Meeting.

TRIBAL WISCONSIN HIGHER EDUCATION GRANT

Introduction

I have included below the 2002-03 Tribal WHEG formula to be used as a reference. As indicated above, the general structure of the WHEG formula is outlined in the State Statutes. The components within may be adjusted to incorporate changes in the cost of education, the Federal Methodology that determines the Expected Family Contribution, the number of applicants that relate to the number of students who enroll, and the available funding.

If the Student Budget is increased, the amount awarded to each student would increase and the number of students eligible would decrease. The number of recipients would also increase if additional funding would be available to support the increase in eligibility.

If the Student Award Percentage is increased, the amount awarded each student would increase and the number of students eligible would decrease. The number of recipients would also increase if additional funding would be available to support the increase in eligibility.

**2002-03
WISCONSIN HIGHER EDUCATION GRANT
WISCONSIN TRIBAL COLLEGES**

The following formula was implemented in 2002-03 for both dependent and independent students.

Student Budget	\$6,560
Minus	Expected Family Contribution
X Student Award Percentage	27.44%
=	Award

MAXIMUM AWARD IS \$1,800

Formula Elements Known at This Time

Applicants: The number of 2003-04 Tribal College applicants may increase slightly.

Federal Methodology (which determines the Expected Family Contributions): There will not be any substantial changes in the formulas for 2003-04.

If the Base Maintenance increases at a higher percentage than the Net Tuition, the amount awarded each student would increase, as would the number of students showing eligibility. The number of recipients, however, would decrease if additional funding would not be available to support the increase in eligibility.

2002-03 WISCONSIN TUITION GRANT FORMULA

STEP ONE	DEPENDENT	SINGLE OR MARRIED INDEPENDENT W/O CHILDREN	SINGLE OR MARRIED INDEPENDENT W/ CHILDREN
TUITION (insert actual tuition charged)	\$6,279	\$6,279	\$6,279
- UW MADISON TUITION	\$3,890	\$3,890	\$3,890
NET TUITION	\$2,389	\$2,389	\$2,389
STEP TWO			
TUITION (insert actual tuition charged)	\$6,279	\$6,279	\$6,279
+ BASE MAINTENANCE	\$6,245	\$6,245	\$10,444
TOTAL COST	\$12,524	\$12,524	\$16,723
STEP THREE			
NET TUITION	\$2,389	\$2,389	\$2,389
DIVIDED BY TOTAL COST	\$12,524	\$12,524	\$16,723
FAMILY CONTRIBUTION PERCENTAGE	19.08%	19.08%	14.29%
STEP FOUR			
FAMILY CONTRIBUTION (insert actual EFC)	\$1	\$1	\$1
X INFLATION FACTOR	204%	546%	660%
ADJUSTED FAMILY CONTRIBUTION	\$204	\$546	\$660
STEP FIVE			
ADJUSTED FAMILY CONTRIBUTION	\$204	\$546	\$660
X FAMILY CONTRIBUTION PERCENTAGE	19.08%	19.08%	14.29%
TUITION OFFSET	\$39	\$104	\$94
STEP SIX			
NET TUITION	\$2,389	\$2,389	\$2,389
- TUITION OFFSET	\$39	\$104	\$94
GRANT AMOUNT	\$2,350	\$2,285	\$2,295
UP TO MAXIMUM GRANT OF \$2,350	\$2,350	\$2,285	\$2,295

Formula Elements Known at This Time

Applicants: The number of 2003-04 applicants is projected to increase.

Federal Methodology (which determines Expected Family Contributions): There will not be any substantial changes in the formulas for 2003-04.

Appropriation: The 2003-04 appropriation for the WTG Program appropriation is unknown at this time. Since 2003-04 is the first year of the biennial period, a final appropriation amount may not be known until some time after July 1, 2003. The governor will introduce his budget on February 18th. It will then go to the legislature for review and potential changes. Therefore, one of several scenarios may occur for 2003-04.

First Scenario:

Funding would remain level funded.

WTG \$22,103,700 (0% increase over 2002-03)

Second Scenario:

Funding would increase per last year's UW tuition increase.

WTG \$23,872,000 (8% increase over 2002-03)

Third Scenario:

Funding would increase based on additional substantial tuition increases for 2003-04.

Fourth Scenario:

Funding would increase based on maintaining the same level of funding as the past.

WTG Additional \$948,300 (4.29% increase over 2002-03)

Fifth Scenario:

Funding would increase based on meeting increasing need due to the increase of needy applicants.

WTG Additional \$884,200 (4% increase over 2002-03)

Given the financial constraints the State of Wisconsin currently has, there of course could be other scenarios where funding would drop below the level appropriated in 2002-03. It is unknown at this time if this will occur.

Tuition Increase: The tuition at the Independent Colleges and Universities will increase on the average by approximately five to six percent. The tuition at UW Madison increased eight percent in 2002-03 (which is what is used in the WTG formula).

Points to Consider in Setting the WTG Formula

*Past practice has been to increase the Base Maintenance at the rate of inflation. The rate of inflation continues to remain stagnant.

*The UW Madison tuition reflected in the formula for 2002-03 is the tuition amount for 2001-02.

*Most recent data indicates that the WTG 2002-03 formula will spend the appropriated amount for the academic year.

*A statutory requirement exists that limits the WTG Program over commitment to 122%.

*The WTG Program no longer has a set maximum award per statute.

The 2002-03 WTG Formula

With the preceding information in mind, I put forth the following.

1. If the funding for the 2003-04 WTG Program increases or decreases, the formula should be adjusted proportionately with consideration given to both adjusting the inflationary factors as well as the maximum grant.
2. There is also a possibility that no increases in funding will occur for next year, which would dictate status quo.

The Wisconsin Association of Independent Colleges and Universities will forward their recommendation for the 2003-04 WTG Formula prior to the February 28th meeting. I will then make a recommendation for the 2003-04 WTG Formula at the February Board Meeting.

WHEG-UW SYSTEM- FEBRUARY 25,2003

	2001-02	2002-03
	<u>(EXCLUDES C/O OF \$370,659)</u>	<u>(INCLUDES C/O OF \$370,659)</u>
UW ALLOCATION:	\$19,380,141	\$22,210,259
FORMULA:	2/26/2002 3290-EFC x 47% = Award Max Award = \$1,546	2/25/2003 3568-EFC x 47% = Award Max Award = \$1,677
DEPENDENT		
APPLICANTS	56,325	58,445
% OF APPLICANTS	77.02%	77.48%
AWARDS	12,414	13,713
% OF AWARDS	54.72%	56.10%
% ELIGIBLE	22.04%	23.46%
AVERAGE \$'s	\$ 1,081	\$ 1,137
\$'s COMMITTED	\$ 13,420,074	\$ 15,587,405
	51.25%	51.79%
INDEPENDENT		
APPLICANTS	16,809	16,986
% OF APPLICANTS	22.98%	22.52%
AWARDS	10,272	10,731
% OF AWARDS	45.28%	43.90%
% ELIGIBLE	61.11%	63.18%
AVERAGE \$'s	\$ 1,243	\$ 1,352
\$'s COMMITTED	\$ 12,766,483	\$ 14,509,368
	48.75%	48.21%
TOTALS		
APPLICANTS	73,134	75,431
AWARDS	22,686	24,444
% ELIGIBLE	31.02%	32.41%
AVERAGE \$'s	\$ 1,154	\$ 1,231
\$'s COMMITTED	\$ 26,186,557	\$ 30,096,773
	100.00%	100.00%
COMMITTED	135.12%	135.51%

NOTES:

0203 Appropriation includes \$1,200,000 approved in the Budget Repair Bill.

WHEG-UW	2001-03 Budget Biennium		1999-2000 Budget Biennium		1997-99 Budget Biennium		1995-97 Budget Biennium	
	2002-03	2001-02	2000-01	1999-2000	1998-99	1997-98	1996-97 (Individual UW Apprpr.)	1995-96 (UW & Tech appropriation) passed 7/26/95
	⁽⁶⁾ Bdgt Repair Bill passed 8/30/01		passed 10/27/99		passed 10/11/97			
Appropriation	\$ 20,639,600	\$ 19,750,800	\$ 18,900,300	\$ 18,900,300	\$ 17,244,800	\$ 16,502,200	\$ 14,283,200	\$ 25,270,200
Carry Forward	370,659	(370,659)	2,047,528	(2,047,528)	751,376	(751,376)	1,531,592	
Carry Back								
Other Adjustments	1,200,000							
Net Appropriation	\$ 22,210,259	\$ 19,380,141	\$ 20,947,828	\$ 16,852,772	\$ 17,996,176	\$ 15,750,824	\$ 15,814,792	\$ 25,270,200
Unspent			306,667		534,678		17,595	
Formula	(Single Formula)	(Single Formula)	(Single Formula)					
Dependent			⁽⁵⁾		⁽²⁾			
Student Budget	\$ 3,568	\$ 3,290	\$ 3,000	\$ 1,510	\$ 1,510	\$ 1,510	\$ 1,510	\$ 1,452
Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC
x % Factor	X 47%	X 47%	X 50%	N/A	N/A	N/A	N/A	N/A
Max Award	\$ 1,677	\$ 1,546	\$ 1,500	1,510	1,510	1,510	1,510	1,452
Independent	(Same as Dep.)	(Same as Dep.)	(Same as Dep.)	⁽³⁾ Eff. 11/1/99	⁽¹⁾ Eff. 12/1/97			
Student Budget				\$ 9,134	\$ 9,134	\$ 9,134	\$ 9,134	\$ 8,800
Less: EFC				Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC
x % Factor				X 16.2%	X 13.68%	X 12.5%	X 10.8%	X 6.8%
Max Award				\$ 1,480	\$ 1,250	\$ 1,101	\$ 986	\$ 598
% Committed (End of Month)			⁽⁴⁾					
April	59.22%	57.03%	39.50%	48.81%	55.33%	60.34%		
May	82.29%	76.64%	58.60%	64.29%	68.72%	74.94%	85.42%	
June	97.32%	89.08%	72.65%	71.70%	81.43%	84.46%	107.94%	
July	99.07%	97.56%	89.11%	86.50%	94.76%	93.09%	117.16%	
August	111.80%	106.69%	101.75%	93.60%	109.02%	108.40%	128.18%	
September	120.81%	118.13%	109.20%	102.94%	117.50%	112.56%	135.18%	
October	124.74%	122.89%	112.09%	108.75%	121.15%	117.79%	135.91%	
November	128.71%	125.74%	113.96%	125.64%	124.43%	118.79%	136.27%	
December	131.48%	128.70%	116.43%	128.74%	127.53%	124.13%	149.38%	
January		130.13%	119.33%	131.15%	129.15%	133.35%	150.80%	
February		132.58%	120.20%	132.61%	131.00%	135.17%	153.11%	
March		133.19%	125.39%	133.61%	131.57%	135.77%	154.27%	
April		133.88%	133.07%	133.30%	133.24%	136.70%	156.86%	
May		134.51%	134.66%	138.84%	135.44%	137.38%	156.23%	
June		134.75%	134.73%	138.84%	135.53%	137.38%	156.23%	
Final		134.77%	134.95%	138.87%	135.54%	137.61%	158.39%	
% SPENT (End of Month)								
August	18.25%	16.44%	20.09%	26.20%	34.00%	35.33%	32.09%	
September	41.20%	39.63%	35.99%	33.00%	42.20%	40.60%	45.79%	
October	46.80%	46.12%	39.85%	37.20%	45.40%	44.50%	47.80%	
November	49.13%	48.03%	42.04%	43.00%	49.10%	47.90%	50.41%	
December	59.54%	57.21%	56.66%	63.40%	74.80%	77.80%	76.63%	
January		83.27%	81.88%	85.70%	91.20%	92.20%	95.52%	
February		95.83%	84.09%	87.98%	92.40%	94.60%	97.35%	
March		96.34%	83.86%	88.37%	93.00%	94.30%	97.83%	
April		96.73%	96.49%	88.69%	95.00%	94.90%	98.11%	
May		97.31%	96.49%	89.14%	97.00%	95.10%	98.11%	
June		98.02%	98.37%	89.14%	97.00%	95.40%	98.11%	
Final		98.13%	98.56%	89.16%	97.10%	95.40%	100.00%	
			Original Ind.		Original Ind.			
			Formula:		Formula:			
			\$	9,134	\$	9,134		
			Less:	EFC	Less:	EFC		
			X	13.9%	X	10.8%		
			\$	1,270	\$	986		

⁽¹⁾ The independent formula change was needed to spend the increased appropriation within the academic year (late budget passage).

⁽²⁾ March, 1999 - Supplemental/summer awards were approved; the WHEG surplus was prorated to each UW school based on previous year spent figures.

⁽³⁾ The independent formula change was needed to spend the increased appropriation within the academic year (late budget passage.)

⁽⁴⁾ 00-01 figures increased due to a computer problem with "size of household" that was corrected mid-August.

⁽⁵⁾ March, 2001 - Supplemental/summer awards were approved; the surplus WHEG funds were prorated to each UW school based on previous year spent figures. This was the first year a single formula was used for both dependent and independent students.

⁽⁶⁾ An additional \$1,200,000 WHEG-UW was appropriated for the 0203 academic year under the Budget Repair Bill

2003-04 WHEG-UW SIMULATIONS (1-21-03) - Used 01-02 Year End Data

0102 Final Report		0304 SIM 1	0304 SIM 2	0304 SIM 3	0304 SIM 4	0304 SIM 5	0304 SIM 6	
APPROPRIATION:	\$19,750,800	A. 02-03 Appropriation					\$21,839,600	
		B. 02-03 Appropriation plus 8%					\$23,586,768	
		C. 02-03 Appropriation plus 11.5%					\$24,351,154	
FORMULA:	(\$3,290 - EFC)	(\$3,568 - EFC)	(\$3,854 - EFC)	(\$3,854 - EFC)	(\$3,978 - EFC)	(\$3,978 - EFC)	(\$3,854 - EFC)	
	x 47% = Award	x 47% = Award	x 47% = Award	x 50% = Award	x 47% = Award	x 50% = Award	x 46.7% = Award	
	Max Award = \$1,546	Max Award = \$1,677	Max Award = \$1,800	Max Award = \$1,927	Max Award = \$1,870	Max Award = \$1,989	Max Award = \$1,800	
DEPENDENT								
APPLICANTS	56,752	56,752	56,752	56,752	56,752	56,752	56,752	
% OF APPLICANTS	76.81%	76.81%	76.81%	76.81%	76.81%	76.81%	76.81%	
AWARDS	12,568	13,576	14,639	14,750	15,087	15,203	14,623	
% OF AWARDS	54.53%	55.65%	57.50%	56.85%	57.22%	57.33%	57.49%	
% ELIGIBLE	22.15%	23.92%	25.79%	25.99%	26.58%	26.79%	25.77%	
AVERAGE \$'s	\$ 1,082	\$ 1,147	\$ 1,208	\$ 1,281	\$ 1,240	\$ 1,309	\$ 1,204	
\$'s COMMITTED	\$ 13,603,653	\$ 15,569,735	\$ 17,688,903	\$ 18,890,286	\$ 18,706,563	\$ 19,904,250	\$ 17,611,577	
	51.11%	51.81%	54.98%	52.54%	52.95%	52.94%	55.04%	
INDEPENDENT								
APPLICANTS	17,131	17,131	17,131	17,131	17,131	17,131	17,131	
% OF APPLICANTS	23.19%	23.19%	23.19%	23.19%	23.19%	23.19%	23.19%	
AWARDS	10,481	10,819	10,819	11,197	11,278	11,317	10,814	
% OF AWARDS	45.47%	44.35%	42.50%	43.15%	42.78%	42.67%	42.51%	
% ELIGIBLE	61.18%	63.15%	63.15%	65.36%	65.83%	66.06%	63.13%	
AVERAGE \$'s	\$ 1,242	\$ 1,339	\$ 1,339	\$ 1,524	\$ 1,474	\$ 1,563	\$ 1,331	
\$'s COMMITTED	\$ 13,014,335	\$ 14,483,466	\$ 14,483,466	\$ 17,061,021	\$ 16,621,319	\$ 17,692,120	\$ 14,388,300	
	48.89%	48.19%	45.02%	47.46%	47.05%	47.06%	44.96%	
TOTALS								
APPLICANTS	73,883	73,883	73,883	73,883	73,883	73,883	73,883	
AWARDS	23,049	24,395	25,458	25,947	26,365	26,520	25,437	
% ELIGIBLE	31.20%	33.02%	34.46%	35.12%	35.68%	35.89%	34.43%	
AVERAGE \$'s	\$ 1,155	\$ 1,232	\$ 1,264	\$ 1,386	\$ 1,340	\$ 1,418	\$ 1,258	
\$'s COMMITTED	\$ 26,617,988	\$ 30,053,200	\$ 32,172,369	\$ 35,951,307	\$ 35,327,882	\$ 37,596,370	\$ 31,999,876	
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
COMMITTED	134.77%	Result A	137.61%	147.31%	164.62%	161.76%	172.15%	146.52%
		Result B	127.42%	136.40%	152.42%	149.78%	159.40%	135.67%
		Result C	123.42%	132.12%	147.64%	145.08%	154.39%	131.41%

Sim 1: Baseline simulation using 0102 year end applicant pool with the 0203 formula

Sim 2: Increase student budget by 8% (equivalent to 8% 0203 tuition increase, excluding segregated fees) and use a 47% formula multiplier, limiting the award to the statutory maximum of \$1800. The Department of Administration used an 8% budget increase for UW WHEG.

Sim 3: Same as Sim 2, except use a 50% formula multiplier

Sim 4: Increase student budget by 11.5% (equivalent to the maximum 0203 tuition increase, excluding segregated fees) and use a 47% formula multiplier

Sim 5: Same as Sim 4, except use a 50% formula multiplier

Sim 6: Same as Sim 2, except reduce the multiplier to stay within the statutory maximum WHEG award of \$1800



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February 25, 2003

Jane Hojan-Clark, Acting Executive Secretary
Wisconsin Higher Educational Aids Board
131 West Wilson Street, Suite 902
Madison, Wisconsin 53707

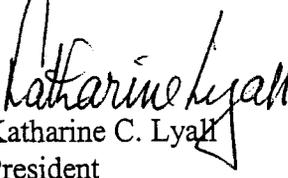
Dear Acting Executive Secretary Hojan-Clark:

Thank you for the opportunity to comment on the Wisconsin Higher Education Grant (WHEG) formula. UW System's WHEG Advisory committee met to discuss the current WHEG formula and to forward a recommendation for the 2003-04 funding formula for my approval. Based on the Committee's advice, I recommend that the formula for 2003-04 continue to tie the equity level to UW-Madison's tuition for the previous year, increasing the equity level from \$3568 to \$3854, and a minimum rationing factor of 47%. This would reaffirm UW System's and the Board of Regents' policy of keeping GPR financial aid increases commensurate with tuition increases.

If additional financial aid dollars become available and the statutorily defined award maximum is eliminated, the rationing factor should be increased resulting in larger awards to the most financially needy students.

Thank you for your consideration of this recommendation. I look forward to hearing your final decision following the meeting of the Higher Educational Aids Board on February 28, 2003.

Sincerely,


Katharine C. Lyall
President

WHEG-WTC- FEBRUARY 25,2003

(Data from 1st School on FAFSA)

	2001-02	2002-03
	<u>(INCLUDES C/B OF 526,863)</u>	<u>(EXCLUDES C/B OF 526,863)</u>
TECH ALLOCATION:	\$14,157,863	\$14,347,137
FORMULA:	2/26/2002 (7000 - EFC) x 15% = Award Max Award = \$1,050	2/25/2003 (7000 - EFC) x 15% = Award Max Award = \$1,050
DEPENDENT		
APPLICANTS	15,873	17,294
% OF APPLICANTS	36.92%	35.02%
AWARDS	7,891	7,699
% OF AWARDS	27.80%	27.01%
% ELIGIBLE	49.71%	44.52%
AVERAGE \$'s	\$ 758	\$ 754
\$'s COMMITTED	\$ 5,983,335	\$ 5,802,552
	24.67%	23.80%
INDEPENDENT		
APPLICANTS	27,121	32,089
% OF APPLICANTS	63.08%	64.98%
AWARDS	20,497	20,803
% OF AWARDS	72.20%	72.99%
% ELIGIBLE	75.58%	64.83%
AVERAGE \$'s	\$ 891	\$ 893
\$'s COMMITTED	\$ 18,271,134	\$ 18,573,625
	75.33%	76.20%
TOTALS		
APPLICANTS	42,994	49,383
AWARDS	28,388	28,502
% ELIGIBLE	66.03%	57.72%
AVERAGE \$'s	\$ 854	\$ 855
\$'s COMMITTED	\$ 24,254,469	\$ 24,376,177
	100.00%	100.00%
COMMITTED	171.31%	169.90%

NOTES:

1. 0203 Appropriation includes \$800,000 increase included in the Budget Repair Bill.
2. Effective October 18, 2002, "W" and "Z" codes were applied to limit overspending.

WHEG-WTC	2001-03 Budget Biennium		1999-2000 Budget Biennium		1997-99 Budget Biennium		1995-97 Budget Biennium	
	2002-03	2001-02	2000-01	1999-2000	1998-99	1997-98	1996-97 (Individual UW Approp.)	1995-96 (UW & Tech appropriation) passed 7/26/95
	⁽⁶⁾ Edgt Repair Bill passed 8/30/01		passed 10/27/99		passed 10/11/97			
Appropriation	\$ 14,074,000	\$ 13,631,000	\$ 13,201,900	\$ 12,454,600	\$ 11,749,600	\$ 11,297,700	\$ 10,863,200	\$ 25,270,200
Carry Forward	38,137	(38,137)	1,098,080	(1,098,080)	68,176	(68,176)		
Carry Back	(565,000)	565,000						
Other Adjustments	800,000							
Net Appropriation	\$ 14,347,137	\$ 14,157,863	\$ 14,299,980	\$ 11,356,520	\$ 11,817,776	\$ 11,229,524	\$ 10,863,200	\$ 25,270,200
Unspent			419,919		70,752		250,794	
Formula	(Single Formula)	(Single Formula)	(Single Formula)				(Same Formula	UW & Tech)
Dependent			⁽³⁾		⁽¹⁾			
Student Budget	\$ 7,000	\$ 7,000	\$ 7,000	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,452
Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC
x % Factor	0	0	0	N/A	N/A	N/A	N/A	N/A
Max Award	\$ 1,050	\$ 1,050	\$ 1,050	1,300	1,300	1,300	1,300	1,452
Independent	(Same as Dep.)	(Same as Dep.)	(Same as Dep.)					
Student Budget				\$ 9,134	\$ 9,134	\$ 9,134	\$ 9,134	\$ 8,800
Less: EFC				Less: EFC	Less: EFC	Less: EFC	Less: EFC	Less: EFC
x % Factor				11.5%	11.5%	9.6%	7.3% X	6.8%
Max Award				\$ 1,050	\$ 1,050	\$ 877	\$ 667	\$ 598
% Committed (End of Month)			⁽⁴⁾					
April	46.55%	48.06%	31.37%	40.94%	44.77%	46.83%		
May	78.70%	71.65%	45.66%	58.19%	60.83%	63.63%	51.03%	
June	103.18%	89.25%	61.43%	70.58%	76.77%	70.40%	68.82%	
July	122.33%	106.70%	76.07%	92.86%	99.41%	90.42%	86.45%	
⁽²⁾ August	145.39%	121.60%	115.60%	104.10%	115.08%	114.40%	100.89%	
September	160.69%	143.62%	125.86%	123.82%	128.28%	121.21%	116.54%	
⁽⁶⁾ October	169.76%	153.56%	132.27%	128.02%	136.92%	129.44%	122.15%	
November	169.99%	161.03%	136.76%	137.22%	146.52%	130.41%	126.72%	
December	169.78%	172.74%	144.52%	144.72%	156.05%	147.76%	131.11%	
⁽⁴⁾ January	169.82%	177.16%	153.78%	150.22%	158.23%	167.57%	133.65%	
⁽⁵⁾ February		171.64%	156.18%	153.91%	166.00%	169.66%	139.12%	
March		171.62%	169.63%	155.41%	167.38%	170.97%	140.20%	
April		171.42%	170.54%	156.29%	168.32%	172.95%	144.49%	
May		171.11%	171.43%	157.34%	168.83%	173.49%	144.49%	
June		171.21%	171.60%	157.34%	169.18%	173.49%	144.49%	
Final		170.86%	171.72%	157.45%	169.33%	173.88%	162.78%	
% SPENT (End of Month)								
August	25.56%	20.48%	26.05%	24.53%	19.30%	23.24%	17.00%	
September	43.36%	39.40%	36.58%	33.42%	33.90%	31.30%	31.09%	
October	51.19%	46.49%	40.88%	39.18%	39.00%	40.00%	37.77%	
November	54.09%	49.00%	42.76%	43.38%	44.40%	42.20%	39.14%	
December	72.80%	71.61%	70.21%	72.25%	78.40%	67.60%	58.63%	
January	96.82%	97.20%	82.15%	83.55%	89.90%	88.60%	73.82%	
February		98.35%	90.53%	89.44%	95.70%	95.70%	77.19%	
March		98.29%	93.18%	90.14%	98.10%	95.22%	81.03%	
April		100.00%	97.57%	90.86%	99.50%	97.30%	83.35%	
May		99.89%	98.09%	91.44%	100.00%	98.40%	83.35%	
June		99.77%	98.37%	91.44%	100.00%	99.10%	83.35%	
Final		99.77%	97.62%	91.16%	98.80%	98.80%	97.73%	
			Original Ind.		Original Ind.			
			Formula:		Formula:			
			\$ 9,134		\$ 9,134			
			Less: EFC		Less: EFC			
			X 13.9%		X 10.8%			
			\$ 1,270		\$ 986			

⁽¹⁾ December, 1997 - a \$90 across the board increase for each spring semester student was used to spend the increased 9798 appropriation within the academic year (late budget passage)

⁽²⁾ August, 2000 - resolved a computer error regarding "size of household" that resulted in increased 0001 WHEG-WTC commitments

⁽³⁾ March, 2001 - a \$65 across the board increase for each spring semester student was awarded to maximize 0001 spending

⁽⁴⁾ January 23, 2002 additional WHEG-WTC commitments were stopped (W codes) and awards were frozen (Z codes) to limit 0102 overspending

⁽⁵⁾ February, 2002 - carryback of 0203 WHEG-WTC appropriation resulted in a decreased 0102 committed figure

⁽⁶⁾ October 18, 2002 additional WHEG-WTC commitments were stopped (W codes) and awards were frozen (Z codes) to limit 0203 overspending

2003-04 WHEG-WTCS SIMULATIONS

	0102 Year End Data		0203 Data through	0203 Data through February 21, 2003			
	(Including W & Z Codes)	0304 SIM 0 (W & Z Codes Removed)	February 18, 2003 (Including W & Z Codes)	0304 SIM 1 (W & Z Codes Removed)	305 SIM 2 (W & Z Codes Removed)	306 SIM 3 (W & Z Codes Removed)	307 SIM 4 (W & Z Codes Removed)
APPROPRIATION:	\$14,196,000 (Incl. \$565,000 Carryback)	\$14,196,000 (Incl. \$565,000 Carryback)	\$14,347,137 (Excl. \$526,863 net Carryback)	\$14,874,000 (LEVEL FUNDING)	\$14,874,001 (LEVEL FUNDING)	\$14,874,002 (LEVEL FUNDING)	\$14,874,003 (LEVEL FUNDING)
FORMULA:	(7000 - EFC) x 15% = Award Max Award = \$1,050	(7000 - EFC) x 15% = Award Max Award = \$1,050	(7000 - EFC) x 15% = Award Max Award = \$1,050	(7500 - EFC) x 11% = Award Max Award = \$825	(7500 - EFC) x 12% = Award Max Award = \$900	(7500 - EFC) x 13% = Award Max Award = \$975	(7500 - EFC) x 14% = Award Max Award = \$1050
DEPENDENT							
APPLICANTS	16,098	16,098	17,263	17,279	17,279	17,279	17,279
% OF APPLICANTS	36.69%	36.69%	35.02%	35.01%	35.01%	35.01%	35.01%
AWARDS	7,890	8,063	7,699	7,961	8,150	8,298	8,431
% OF AWARDS	27.79%	27.33%	27.01%	26.51%	26.79%	27.02%	27.22%
% ELIGIBLE	49.01%	50.09%	44.60%	46.07%	47.17%	48.02%	48.79%
AVERAGE \$'s	\$ 759	\$ 759	\$ 754	\$ 611	\$ 657	\$ 704	\$ 750
\$'s COMMITTED	\$ 5,985,908	\$ 6,121,804	\$ 5,802,552	\$ 4,865,667	\$ 5,357,371	\$ 5,842,380	\$ 6,326,292
	24.68%	24.22%	23.81%	23.59%	23.71%	23.80%	23.87%
INDEPENDENT							
APPLICANTS	27,775	27,775	32,031	32,071	32,071	32,071	32,071
% OF APPLICANTS	63.31%	63.31%	64.98%	64.99%	64.99%	64.99%	64.99%
AWARDS	20,499	21,438	20,801	22,072	22,272	22,414	22,546
% OF AWARDS	72.21%	72.67%	72.99%	73.49%	73.21%	72.98%	72.78%
% ELIGIBLE	73.80%	77.18%	64.94%	68.82%	69.45%	69.89%	70.30%
AVERAGE \$'s	\$ 891	\$ 894	\$ 893	\$ 714	\$ 774	\$ 835	\$ 895
\$'s COMMITTED	\$ 18,268,871	\$ 19,155,243	\$ 18,572,088	\$ 15,764,259	\$ 17,242,136	\$ 18,709,208	\$ 20,176,442
	75.32%	75.78%	76.19%	76.41%	76.29%	76.20%	76.13%
TOTALS							
APPLICANTS	43,873	43,873	49,294	49,350	49,350	49,350	49,350
AWARDS	28,389	29,501	28,500	30,033	30,422	30,712	30,977
% ELIGIBLE	64.71%	67.24%	57.82%	60.86%	61.65%	62.23%	62.77%
AVERAGE \$'s	\$ 854	\$ 857	\$ 855	\$ 687	\$ 743	\$ 799	\$ 856
\$'s COMMITTED	\$ 24,254,779	\$ 25,277,047	\$ 24,374,640	\$ 20,629,926	\$ 22,599,507	\$ 24,551,588	\$ 26,502,734
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
COMMITTED	170.86%	178.06%	169.89%	138.70%	151.94%	165.06%	178.18%

Sim 0: Simulation using 0102 year end applicant pool and WHEG-WTC formula with the W & Z codes removed so awards would calculate for all 0102 applicants.

Sims 1-4: Simulations using the 0203 1/28/03 applicant pool with the W & Z codes removed so awards will calculate for all applicants. The student budget was increased to \$7500 to reflect a more accurate budget figure.

**2002-2003
TRIBAL WHEG
DOLLARS COMMITTED**

February 25, 2003
ACADEMIC YEAR
2002-2003

DEPENDENTS	APPLICANTS	142
	AWARDS	17
	% ELIGIBLE	11.97%
	AVERAGE \$'s	\$1,528
	\$'s COMMITTED	\$25,971
		6.64%
INDEPENDENTS	APPLICANTS	633
	AWARDS	228
	% ELIGIBLE	36.02%
	AVERAGE \$'s	\$1,602
	\$'s COMMITTED	365,175
		93.36%
TOTALS	APPLICANTS	775
	AWARDS	245
	% ELIGIBLE	31.61%
	AVERAGE \$'s	\$1,597
	\$'s COMMITTED	\$391,146
		100.00%
	* OVERAWARD	96.82%

Student Budget	\$6,560
minus EFC	minus EFC
Times Award Percentage	27.44%
Equals Award	Equals Award

Max Award	\$1,800
Allocation	\$404,000

W CODED 8/30/02

Hojan-Clark, Jane

From: Schuyler Houser [shouser@lco-college.edu]
Sent: Thursday, February 27, 2003 1:45 PM
To: jane.hojan-clark@heab.state.wi.us
Subject: adjustment of state formula

Dear Jane,
Agnes Fleming passed along to me your email requesting our recommendation for a WHEG formula for the coming fiscal year. We recommend that the formula remain the same as it is this year. Thanks for consulting us.

Schuyler Houser
President,
Lac Courte Oreilles Ojibwa Community College

Hojan-Clark, Jane

From: Regina Prey [rprey@menominee.edu]
Sent: Monday, February 17, 2003 1:52 PM
To: jane.hojan-clark@heab.state.wi.us
Subject: Re: 03 04 CMN Tribal WHEG Formula Request

Hello Jane,

I believe that the current formula serves our students well. One thing that I would like to add is that it would be better to have a certain cap amount for students verses the 10 semester maximum. The reason that I say that is as follows:

Suppose a student has a high estimated family contribution and is only eligible for half of the entire amount of 900 that they are eligible for. Then a day comes when they are laid off of work and do not have a job and their 10 semesters have ran out or are close to running out. Sometimes it seems as though we punish students that try to go to work and school.

The other thing is that our schools are growing and we run out of funding for our students way too soon. Please consider our growth when figuring out the cap amounts.

Thank you,

Regina Prey
Director of Financial Aid
College of Menominee Nation
Office: 715-799-6226 ext. 3039
Fax: 715-799-1336

**2002-2003
TUITION GRANT
DOLLARS COMMITTED**

February 26, 2002 ACADEMIC YEAR 2001-2002	NOTIFICATION LIST February 25, 2003 2002-2003
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DEPENDENTS	APPLICANTS	11,776	11,736
	% OF APPLICANTS	62.94%	63.73%
	AWARDS	7,768	8,005
	% OF AWARDS	65.94%	66.79%
	% ELIGIBLE	65.96%	68.21%
	AVERAGE \$s	\$2,157	\$2,208
	\$s COMMITTED	\$16,757,426	\$17,678,788
		66.50%	67.17%
SINGLE MARRIED NO DEPENDENTS	APPLICANTS	2,719	2,591
	% OF APPLICANTS	14.53%	14.07%
	AWARDS	1,023	1,051
	% OF AWARDS	8.68%	8.77%
	%ELIGIBLE	37.62%	40.56%
	AVERAGE \$\$	\$2,104	\$2,161
	\$s COMMITTED	\$2,152,633	\$2,271,569
		8.54%	8.63%
INDEPENDENT WITH DEPENDENTS	APPLICANTS	4,214	4,088
	% OF APPLICANTS	22.52%	22.20%
	AWARDS	2,990	2,929
	% OF AWARDS	25.38%	24.44%
	%ELIGIBLE	70.95%	71.65%
	AVERAGE \$\$	\$2,103	\$2,175
	\$s COMMITTED	\$6,288,291	\$6,371,065
		24.96%	24.20%
TOTALS	APPLICANTS	18,709	18,415
	AWARDS	11,781	11,985
	%ELIGIBLE	62.97%	65.08%
	AVERAGE \$\$	\$2,139	\$2,196
	\$s COMMITTED	\$25,198,350	\$26,321,422
		100.00%	100.00%
OVERAWARD		116.85%	116.85%
FAFSA Data - school one only.	STUDENTS	11,781	11,985
	AVERAGE	\$2,139	\$2,196
Tuition Grant Factors			
UW Tuition		\$3,735	\$3,890
<u>Inflation Factors</u>			
Dependent student		204%	204%
Single/married independent		546%	546%
Independent with dependents		660%	660%
<u>Base Maintenance</u>			
Dependent/Single		\$6,245	\$6,245
Independent with dependents		\$10,444	\$10,444
MAX AWARD		\$2,300	\$2,300
APPROPRIATION		\$21,564,600.00	\$22,103,700.00
Carry forward			\$422,752
Net Funds			\$22,526,452.00

Wisconsin Tuition Grant

	2001-03 Budget Biennium		1999-2000 Budget Biennium		1997-99 Budget Biennium		1995-97 Budget Biennium	
	2002-03	2001-02	2000-01	1999-2000	1998-99	1997-98	1996-97	1995-96
BUDGET REPAIR BILL								
7/26/2002	passed 8/30/01			passed 10/27/99		passed 10/11/97		passed 7/26/95
Appropriation	\$ 22,103,700.00	\$21,564,600	\$21,038,600	\$19,662,200	\$18,379,000	\$17,173,700	\$16,050,200	\$16,050,200
Carry Forward	\$422,752		\$2,254,247		\$19,680		\$170,114	
Funds Available	\$22,526,452		\$23,292,847		\$1,809,680		\$16,220,314	
Carried back						\$300,000		
Unspent		\$422,752	\$111,028	\$2,254,247	\$27,395	\$19,680	\$8,733	\$170,114
Refunds		\$1,051,713	\$882,522	\$971,274				
Final Year End Formula			Changed 6/28/00	Changed 11/18/99		Changed 12/2/97		
UW MADISON TUITION for Tuition Grant Purposes	\$ 3,890	\$3,735	\$3,735	\$3,405	\$2,892	\$2,754	\$2,623	\$2,528
INFLATION FACTORS								
Dependent Student	204%	204%	145%	270%	270%	270%	360%	360%
Single/married independent without dependents	546%	546%	389%	725%	725%	725%	1000%	1000%
Independent student with dependents	660%	660%	470%	875%	875%	875%	1200%	1200%
BASE MAINTENANCE								
Dependent, Single Independent, married without dependents	\$6,245	\$6,245	\$6,245	\$6,245	\$6,245	\$6,005	\$5,830	\$5,660
Independent with dependents	\$10,444	\$10,444	\$10,444	\$10,444	\$10,444	\$10,042	\$9,750	\$9,466
Max Award	\$2,350	\$2,375	\$2,300	\$2,300	\$2,300	\$2,172	\$2,172	\$2,172
Overaward Max	122%	122%	122%	122%	122%	122%	122%	122%
"W" Codes - put into effect			12/12/00		10/28/98	03/16/98		10/03/95
"W" Codes - released			04/30/01					
Other Adjustments		March 2002						
% Committed	% Committed	% Committed	% Committed	% Committed	% Committed	% Committed	% Committed	% Committed
(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)
April	71.46%	75.18%	53.70%		65.07%		60.73%	75.90%
May	93.03%	89.42%	71.33%	65.07%	74.16%		99.45%	86.00%
June	103.50%	98.65%	102.14%	98.65%	103.57%	88.39%		109.91%
July	111.47%	105.65%	104.62%	98.82%	106.29%	96.78%		117.42%
August	118.24%	110.73%	119.73%	104.06%	114.46%	112.31%	106.70%	116.69%
September	115.17%	114.97%	120.51%	110.61%	116.47%	108.22%	111.00%	121.25%
October	115.89%	113.67%	120.26%	111.25%	118.20%	108.98%	119.46%	119.73%
November	115.57%	114.94%	122.61%	111.34%	116.31%	109.33%	108.39%	118.10%
December	117.19%	116.14%	122.33%	108.71%	115.26%	120.06%	108.84%	116.25%
January	116.46%	117.95%	119.77%	110.30%	115.01%	124.00%	111.05%	109.01%
February		116.85%	119.87%	110.65%	113.47%	114.01%	110.82%	102.17%
March		122.02%	120.74%	109.08%	113.57%	114.06%	110.81%	107.98%
April		122.01%	119.71%	109.22%	113.67%	112.56%		
May		121.97%	120.74%	109.50%	114.49%	112.78%	119.15%	
June		121.95%	120.86%	109.68%	114.75%	112.23%		
Final			120.88%	122.86%	115.47%	111.67%	119.46%	102.76%
					no cuts			
% Spent	% Spent	% Spent	% Spent	% Spent	% Spent	% Spent	% Spent	% Spent
(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)	(end of month)
August	24.04%	22.51%	22.99%	22.06%	26.00%	23.53%		
September	36.51%	29.34%	31.47%	29.06%	35.10%	32.20%		
October	43.03%	41.34%	40.47%	35.98%	46.97%	24.79%		
November	47.38%	45.10%	47.51%	38.91%	51.86%	44.19%		
December	60.15%	52.97%	56.25%	51.04%	66.84%	64.81%		
January	80.99%	79.21%	78.70%	73.46%	76.70%	73.04%	80.02%	
February		86.69%	93.69%	82.32%	95.54%	83.88%	91.50%	
March		90.23%	94.01%	80.60%	95.84%	94.61%		
April		96.85%	98.39%	84.16%	99.25%	99.67%	99.19%	
May		97.38%	99.26%	83.94%	100.07%	99.67%		
June		98.11%	99.66%	88.54%	100.10%	99.96%		
Final			99.52%	88.58%	100.00%	100.00%	98.84%	
Original Formula:	Original Formula:	Original Formula:	Original Formula:	Original Formula:	Original Formula:	Original Formula:	Original Formula:	Original Formula:
UW MADISON TUITION	\$3,890	\$3,735	\$3,735	\$3,405	\$2,892	\$2,754	\$2,623	\$2,538
DEPENDENT STUDENTS	204%	204%	251%	308%	270%	325%	360%	360%
SINGLE/MARRIED INDEPENDENT WITHOUT DEPENDENTS	546%	546%	674%	827%	725%	900%	1000%	1000%
INDEPENDENT WITH DEPENDENTS	660%	660%	814%	998%	875%	1080%	1200%	2000%
DEPENDENTS, SINGLE INDEPENDENT, MARRIED W/O DEPENDENTS	\$6,245	\$6,245	\$6,245	\$6,245	\$6,245	\$6,005	\$5,830	\$5,660
INDEPENDENT WITH DEPENDENTS	\$10,444	\$10,444	\$10,444	\$10,444	\$10,444	\$10,042	\$9,750	\$9,466
FIRST NOTIFICATION LIST DISTRIBUTED	3/18/02	04/10/01	04/19/00	03/22/99	04/13/98	03/14/97	04/03/96	04/21/95
APPLICANTS (End of the year)		18,877	18,622	18,005	16,126	16,166	17,496	19,004
NUMBER OF GRANTS AWARDED (Biennial Statements)		11,089	12,343	9,306	9,406	9,788	9,067	8,703
AVERAGE TUITION	\$15,671	\$14,967.00	\$14,026.00	\$12,779	\$13,474.00	\$12,820.00	\$12,272.00	\$11,512.00

95-96
11/17/95 grandfathered non- standard tuition until 98-99

97-98
\$300,000 carried back from 98-99.

Tribal College in WTG retroactive to beginning of AY.

98-99
12/15/99 letter possible reduction of awards between \$0-\$95.
Tribal college students spent 330,000 in 98-99.

Change in federal income protection.
Schools held to 2nd reconciliation. No cuts occurred.

Max award changed from \$2,172-\$2,300.

99-00
Year split Tribal-Tg/Tribal Whgeg - funds available 1/13/00.

01-02
Award increase to 2375 during second semester -
this done thru formula adjustment not across the board inc.

Budget repair bill signed July 26,2002

02-03
Selective service block in effect for first time-no major impact.
Budget repair bill signed July 26,2002

2003-2004 SIMULATION
TUITION GRANT
DOLLARS COMMITTED

	Base Sim	Sim A	SIM B	SIM B.1	SIM B.2	SIM B.3	SIM C	SIM D
	2001-2002 data	2001-2002 data	2001-2002 data	2001-2002 data	2001-2002 data	2001-2002 data	2001-2002 data	2001-2002 data
DEPENDENTS								
APPLICANTS	11,824	11,824	11,824	11,824	11,824	11,824	11,824	11,824
% OF APPLICANTS	61.91%	61.91%	61.91%	61.91%	61.91%	61.91%	61.91%	61.91%
AWARDS	7,962	8,110	7,532	7,524	7,524	7,342	7,342	5,464
% OF AWARDS	65.46%	65.77%	65.14%	65.13%	65.13%	64.97%	64.97%	61.52%
% ELIGIBLE	67.34%	68.59%	63.70%	63.63%	63.63%	62.09%	62.09%	46.21%
AVERAGE \$\$	\$2,230	\$2,236	\$2,217	\$2,217	\$2,259	\$2,341	\$2,211	\$2,194
\$\$ COMMITTED	\$17,758,429	\$18,130,691	\$16,695,209	\$16,683,920	\$16,994,866	\$17,612,495	\$16,234,989	\$11,986,034
	66.01%	66.45%	65.73%	65.68%	65.67%	65.64%	65.47%	61.78%
SINGLE								
MARRIED								
NO DEPENDENTS								
APPLICANTS	2,826	2,826	2,826	2,826	2,826	2,826	2,826	2,826
% OF APPLICANTS	14.80%	14.80%	14.80%	14.80%	14.80%	14.80%	14.80%	14.80%
AWARDS	1068	1078	1020	1014	1014	984	984	824
% OF AWARDS	8.78%	8.74%	8.82%	8.78%	8.78%	8.71%	8.71%	9.28%
%ELIGIBLE	37.79%	38.15%	36.09%	35.88%	35.88%	34.82%	34.82%	29.16%
AVERAGE \$\$	\$2,205	\$2,216	\$2,182	\$2,198	\$2,272,011	\$2,325	\$2,215	\$2,213
\$\$ COMMITTED	\$2,355,456	\$2,388,643	\$2,226,035	\$2,226,035	\$2,226,035	\$2,357,684	\$2,179,426	\$1,823,698
	8.76%	8.76%	8.76%	8.77%	8.60%	8.79%	8.79%	9.40%
INDEPENDENT								
WITH								
DEPENDENTS								
APPLICANTS	4,448	4,448	4,448	4,448	4,448	4,448	4,448	4,448
% OF APPLICANTS	23.29%	23.29%	23.29%	23.29%	23.29%	23.29%	23.29%	23.29%
AWARDS	3,134	3,143	3,011	3,014	3,014	2,975	2,975	2,593
% OF AWARDS	25.76%	25.49%	26.04%	26.09%	26.09%	26.33%	26.33%	29.20%
%ELIGIBLE	70.46%	70.66%	67.69%	67.76%	67.76%	66.88%	66.88%	58.30%
AVERAGE \$\$	\$2,166	\$2,152	\$2,152	\$2,153	\$2,210	\$2,277	\$2,146	\$2,156
\$\$ COMMITTED	\$6,787,536	\$6,763,849	\$6,478,535	\$6,489,670	\$6,659,828	\$6,861,378	\$6,384,010	\$5,590,946
	25.23%	24.79%	25.51%	25.55%	25.73%	25.57%	25.74%	28.82%
TOTALS								
APPLICANTS	19,098	19,098	19,098	19,098	19,098	19,098	19,098	19,098
AWARDS	12,164	12,331	11,563	11,552	11,552	11,301	11,301	8,881
%ELIGIBLE	63.69%	64.57%	60.55%	60.49%	60.49%	59.17%	59.17%	46.50%
AVERAGE \$\$	\$2,212	\$2,213	\$2,197	\$2,199	\$2,240	\$2,323	\$2,194	\$2,185
\$\$ COMMITTED	\$26,901,421	\$27,283,183	\$25,399,779	\$25,402,555	\$25,880,729	\$26,831,557	\$24,798,425	\$19,400,678
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
OVERAWARD	119.42%							
		123.43% 02-03 approp.	114.91% 02-03 approp.	114.92% 02-03 approp.	117.09% 02-03 approp.	121.39% 02-03 approp.	112.19% 02-03 approp.	87.77% 02-03 approp.
		154.29% 20% reduction	143.64% 20% reduction	143.66% 20% reduction	146.36% 20% reduction	151.74% 20% reduction	140.24% 20% reduction	109.71% 20% reduction
		145.21% 15% reduction	135.19% 15% reduction	135.21% 15% reduction	137.75% 15% reduction	142.81% 15% reduction	131.99% 15% reduction	103.26% 15% reduction
		137.15% 10% reduction	127.68% 10% reduction	127.69% 10% reduction	130.10% 10% reduction	134.88% 10% reduction	124.66% 10% reduction	97.52% 10% reduction
		129.93% 5% reduction	120.96% 5% reduction	120.97% 5% reduction	123.25% 5% reduction	127.78% 5% reduction	118.10% 5% reduction	92.39% 5% reduction
FAFSA Data - school one only.								
STUDENTS								
AVERAGE	12,164	12,331	11,563	11,552	11,552	11,301	11,301	8,881
	\$2,212	\$2,213	\$2,197	\$2,199	\$2,240	\$2,323	\$2,194	\$2,185
Tuition Grant Factors								
UW Tuition	\$3,890	\$4,426	\$4,426	\$4,426	\$4,426	\$4,426	\$4,426	\$4,426
Inflation Factors								
Dependent student	204%	204%	235%	235%	235%	235%	245%	367%
Single/married independent	546%	546%	628%	628%	628%	628%	655%	983%
Independent with dependents	660%	660%	759%	759%	759%	759%	792%	1188%
Base Maintenance								
Dependent/Single	\$6,245	\$6,245	\$6,245	\$6,245	\$6,245	\$6,245	\$6,245	\$6,245
Independent with dependents	\$10,444	\$10,444	\$10,444	\$10,444	\$10,444	\$10,444	\$10,444	\$10,444
MAX AWARD	\$2,350	\$2,350	\$2,350	\$2,350	\$2,400	\$2,500	\$2,350	\$2,350
APPROPRIATION 02-03								
Carry forward	\$22,103,700	\$22,103,700 02-03 approp.						
Net Funds	\$422,752	\$18,788,145 15% reduction						
	\$22,526,452	\$19,893,330 10% reduction						
		\$20,998,515 5% reduction						

Base sim: 01-02 Applicants, 02-03 Formula

Sim A: 01-02 Applicants, 02-03 inflation factors, increase in school tuitions by 5.3% and increase in UW Madison Tuition.

Sim B: 01-02 Applicants, 15% increase of inflation factors and increase of school tuitions by 5.3% and increase of UW Madison Tuition.

Sim B.1: 01-02 Applicants, 15% increase of inflation factors and actual/estimates of school tuitions and increase of UW Madison Tuition.

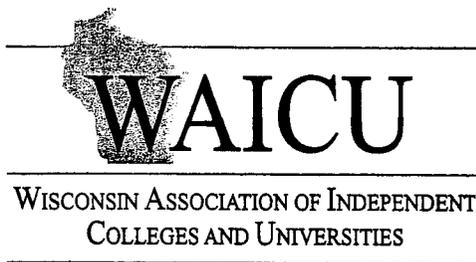
Sim B.2: 01-02 Applicants, 15% increase of inflation factors and actual/estimates of school tuitions and increase of UW Madison Tuition increase max award to 2400.

Sim B.3: 01-02 Applicants, 15% increase of inflation factors and actual/estimates of school tuitions and increase of UW Madison Tuition increase max award to 2500.

Sim C: 01-02 Applicants, 20% increase of inflation factors and increase of school tuitions by 5.3% and increase of UW Madison Tuition.

Sim D: 01-02 Applicants, 80% increase of inflation factors and increase of school tuitions by 5.3% and increase of UW Madison Tuition.

ALVERNO COLLEGE
BELOIT COLLEGE
CARDINAL STRITCH UNIVERSITY
CARROLL COLLEGE
CARTHAGE COLLEGE
CONCORDIA UNIVERSITY
EDGEWOOD COLLEGE
LAKELAND COLLEGE
LAWRENCE UNIVERSITY
MARIAN COLLEGE



MARQUETTE UNIVERSITY
MILWAUKEE INSTITUTE OF ART & DESIGN
MILWAUKEE SCHOOL OF ENGINEERING
MOUNT MARY COLLEGE
NORTHLAND COLLEGE
RIPON COLLEGE
ST. NORBERT COLLEGE
SILVER LAKE COLLEGE
VITERBO UNIVERSITY
WISCONSIN LUTHERAN COLLEGE

February 24, 2003

Ms. Jane Hojan-Clark, Executive Secretary
Higher Educational Aids Board
131 W. Wilson Street, Suite 902
Madison, WI 53702

Dear Ms. Hojan-Clark:

As required by state statute, I am transmitting to you WAICU's recommendations for changes in the Wisconsin Tuition Grant (WTG) formula for the 2003-2004 academic year. I understand the recommendation will be considered by the Higher Educational Aids Board (HEAB) at its meeting on February 28, 2003.

Based on discussions with your staff and the WAICU Financial Aid Directors, it is WAICU's recommendation that HEAB update the formula to reflect the factors in "SIM B.3" on the enclosed spreadsheet developed by your staff. This simulation updates the UW tuition component of the formula, as required by law, increases the inflation factors from last year's formula, and increases the maximum award amount to \$2,500.

Making these changes will increase the average award for students in all categories, achieving the objective of making the Tuition Grant a more meaningful part of the financial aid package for those students with the greatest need. These projections assume that the current appropriation of \$22,103,700 for fiscal year 2003-2004 remains unchanged. Given the state fiscal picture, if the legislature adopts changes in the funding level, WAICU is prepared to discuss revising other factors in the formula.

I want to thank you again for meeting with me and the WAICU Financial Aid Directors to discuss the WTG formula for 2003-2004. Should you have questions or concerns regarding the WAICU recommendations, please contact either me or Mr. Paul Nelson, WAICU Vice President for Public Policy.

Best wishes . . .

Sincerely,

Rolf Wegenke, Ph.D.
President

Enclosure

c: WAICU Presidents
WAICU Financial Aid Directors

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President

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